

Community Foundation Alliance Financial Assistance Questionnaire

FINANCIAL INFORMATION (CONFIDENTIAL)

The following form is to be completed ONLY if listed in the scholarship application instructions and selection document as a requirement for the scholarship(s) for which you are applying. You may be required to submit proof of the financial information that you provide in this form.

SECTION 1: Student Information

Name of student		
Address, city, state, zip		
Current marital status		
Is student an "Independent Student" as defined by the United States Department of Education?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please state the number of people in your household who are employed.		
Is student a veteran of the U.S. Armed Forces?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does student have any legal dependents? If yes, please describe:	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is the student currently a ward of the court or was the student a ward of the court until age 18?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

SECTION 2: Parents/ Guardian Information

If student is an **independent student**, skip to section 3

Name(s) of parents	
Name(s) of legal guardian(s), if applicable	
Address, city, state, zip	
Current marital status	
Age of older parent or guardian	
Number of parents/guardians who are employed	

SECTION 3: Income, Expense, and Asset Data

If student can be legally classified as an independent student, please complete the "Student" column ONLY, providing income information for the student's spouse if applicable. If student is a dependent student, both columns must be completed unless otherwise indicated.

NOTE: Please answer each question below based on information you will provide on your IRS Tax Form 1040, 1040A, or 1040EZ to be filed by April 15, 2008 (unless otherwise instructed).

	Parent	Student
Are you eligible to file IRS Tax Form 1040A or 1040EZ?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you file a federal tax return in the previous tax year (2007)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Adjusted gross income:	\$	\$
Student's earned income from work:	\$	\$
Student's spouse's earned income from work (if applicable):	\$	\$
Father's earned income:	\$	\$
Mother's earned income:	\$	\$

	Parent	Student
Total U.S. income tax paid (total amount of Federal income tax paid - not the amount withheld on your paycheck by your employer):	\$	\$
Untaxed income and benefits (Social Security, TANF, AFDC, ADC, etc., not included in the adjusted gross income figure above):	\$	\$
Other income and credits (education credits, child support, federal work study, grant and scholarship aid, earned income credit):	\$	\$
Total amount in cash, savings, and checking accounts:	\$	\$
Net worth of investments (do not include family home):	\$	\$
Business and/or farm net worth:	\$	\$
Total number of exemptions as claimed on your income tax form (if you are a dependent student, please complete the "Parent" column only):		
Number of people in your household (if you are a dependent student, please complete the "Parent" column only):		
Number of people in your household who will be in college during the 2008-2009 academic year (if you are a dependent student, please complete the "Parent" column only):		

SECTION 4: Student Budget Information

Tuition and fees	\$
Books and supplies	\$
Room and board	\$
Personal expenses	\$
Transportation	\$
Other (list):	\$
Other (list):	\$
Other (list):	\$
Total Estimated Budget	\$

Parent contribution	\$
Student's contribution	\$
Spouse contribution (if applicant is an independent student)	\$
VA or SS benefits	\$
Other aid (Pell grant, work study, etc.)	\$
Other (list):	\$
Other (list):	\$
Other (list):	\$
Total Anticipated Resources	\$